

My group is hosting the **2014 Alabama Fiduciary Summit** in Birmingham, Alabama. The event is a top educational and networking event and part of our 2014 Retirement Plan Road Show Series that we host across the nation. Our events feature elite speakers ranging from the Department of Labor, industry consultants, auditors, and plan sponsor executive panels. The 2014 Alabama Fiduciary Summit is **certified for 3 hours of HRCI/SPHR/PHR/GPHR credit.**

Event Info:

Date: October 23rd, 2014

Time: 11:30am to 3:00pm (Breakfast Served)

Location: The Club

1 Robert S Smith Dr, Birmingham, AL 35209

Keynote Speakers:

1. Renn Williams & Andrew Blankenship - J. Smith Lanier & Co. Retirement Services Group
2. Joe Lassiter – Partner – Pearce, Beville, Leesburg, Moore, P.C.
3. Angela Coker - Audit Partner – Sellers, Richardson, Holman & West LLC
4. Bob Ellerbrock - Employee Benefits/ERISA Attorney at Balch & Bingham LLP
5. John Choate - Former US Navy Seal

Topics of Discussion:

- What Every Fiduciary Should Know for 2014 & 2015
- Target Date Fund Panel (Featuring Senior Portfolio Managers from: American Century, T. Rowe Price, and Putnam)
- Local Expert Professional Panel
- Plan Sponsor Panel - Insights From Your Peers
- Evaluating the Reasonableness of Plan Fees

Attached is our mailer invitation for this event and a previous posting of the SHRM group we have worked with in Atlanta. Below is the registration link.

<http://xgrowthsolutions.com/retirement-events/2014/10/2014-alabama-fiduciary-summit/>

We have **worked with other SHRM Chapters all over the country**; locations include San Diego, Atlanta, Iowa, Virginia, Kansas City, Arizona, Chicago, St. Louis, and Los Angeles. (see below for some of the SHRM content for our events)

Here is a link to our Retirement Plan Roadshow conference testimonials.

<http://xgrowthsolutions.com/about-us/>

****We would be delighted to extend an invitation to the Alabama SHRM and waive the \$150 Registration Fee for your members to join us. Please let me know your thoughts and interest in extending the invitation to your members.****

2014

Alabama

Fiduciary Summit

Join Us October 23rd!

You're invited!

You are cordially invited to join us for the Alabama Fiduciary Summit on October 23rd, 2014. The summit is an educational workshop for local employers, plan sponsors, and executives discussing retirement plan best practices and strategies.

[More Details & Agenda>>](#)

The summit is the 17th stop on the 2014 [Retirement Plan Roadshow](#), which has helped thousands of plan sponsors positively impact millions of America's participants.

Seating is limited! Register now to guarantee your seat and waived \$150 registration fee.

Summit Details

Guest Speakers

- Renn Williams & Andrew Blankenship- J. Smith Lanier & Co. Retirement Services Group
- Joe Lassiter, Partner - Pearce, Bevell, Leesburg, Moore, P.C.
- Angela Coker, Audit Partner - Sellers, Richardson, Holman& West LLC

[Click to Register](#)

When

Wednesday October 23rd,
2014
11:00am-3:00pm
(Lunch Served)

Where

The Club
1 Robert S Smith Dr,
Birmingham, AL 35209

Who Should Attend?

-Finance & HR Executives,
Business Owners, and
Fiduciaries

-Plan Sponsors with 401(k),
403(b), 457, or DB Pension
Plans

- Bob Ellerbrock, ERISA Counsel at Balch & Bingham LLP
- John Choate - Former US Navy Seal

Continuing Education Credits:

Certified for 3 hours of CPA/CPE credit, 3 hours of HRCI General credit and 3 CEBS Credits

For more information or to RSVP, please contact 619-359-6844 or send an email to:

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www.nasba.org

Min Oh

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